INTERWOVEN

TeamSite® Templating User's Guide

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INTERWOVEN

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About This Book

TeamSite Templating User's Guide is a guide to using TeamSite® Templating. It is primarily intended for TeamSite Authors and Editors.

Chapter 1, "Overview," provides an introduction to TeamSite Templating concepts.

Chapter 2, "Using TeamSite Templating Browser," describes how to use TeamSite Templating Browser from TeamSite WebDesk.

Chapter 3, "Using TeamSite Templating Java," describes how to use TeamSite Templating Java™ from TeamSite WebDesk Pro.

Appendix A, "Formatting Text," describes the procedures for applying styles to text using the RTF and VisualFormat features.

Appendix B, "Installing TeamSite Templating Java for Clients," provides installation instructions for TeamSite Templating Java.

Online Documentation Errata

Additions and corrections to this document are available in PDF format at the following site. Browse to the download and release notes directories.

`http://support.interwoven.com`

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Notation Conventions

This manual uses the following notation conventions:

Convention	Definition and Usage
Bold	Text that appears in a GUI element (such as menu items, buttons, or elements of a dialog box) and command names are shown in bold. For example: Click **Edit File** in the tool bar.
Italics	Book titles appear in italics. Terms are italicized the first time they are introduced. Valuable information may be italicized for emphasis.
`Monospace`	Commands, command-line output, and file names are in monospace type. For example: The `iwextattr` command-line tool allows you to set and look up extended attributes on a file.
`Monospaced italic`	Monospaced italics are used for command-line variables. For example: `iwckrole` *`role user`* This means that you must replace *`role`* and *`user`* with your values.
`Monospaced bold`	Monospaced bold represents information you enter in response to system prompts. The character that appears before a line of user input represents the command prompt, and should not be typed. For example: **`iwextattr -s project=proj1 //IWSERVER/default/main/dev/WORKAREA/andre/products/index.html`**
`Monospaced bold italics`	Used to indicate a variable in response to a system prompt.
`[]`	Square brackets surrounding a command-line argument mean that the argument is optional.
`|`	Vertical bars separating command-line arguments mean that only one of the arguments can be used.

Chapter 1

Overview

TeamSite Templating provides a highly flexible way to publish XML content through easy-to-use templates and then display that content based on one or more presentation formats. Because TeamSite Templating separates content entry from presentation, you can reuse content after it is captured and stored. TeamSite Templating also lets you present the same content in different ways using different presentation templates. This chapter provides an overview of TeamSite Templating.

TeamSite Templating Interfaces

TeamSite Templating can be used with two types of interfaces:

- TeamSite Templating Browser provides a browser-based interface that you use to enter data and create Web pages. This interface is always available. Refer to Chapter 2, "Using TeamSite Templating Browser," for instructions on using this interface.
- TeamSite Templating Java® provides a Java-based interface that you use to enter data and create Web pages. This interface requires that Java software be installed on your computer (see Appendix B, "Installing TeamSite Templating Java for Clients," for installation instructions). Your system administrators determine whether your installation supports the Java interface. Refer to Chapter 3, "Using TeamSite Templating Java," for instructions on using this interface.

The two interfaces provide similar functionality, but the appearance of the data capture forms and some dialog boxes is different. Additionally, the procedures for inserting, deleting, and moving replicants and for formatting text differ between the two interfaces.

If your installation supports both interfaces, you can switch between them. However, most users will probably prefer to use a single interface. You can determine if your installation supports the Java interface by checking with your system administrator or by looking for the menu item to switch between interfaces as described on page 8.

Switching Interfaces

Your installation determines whether it supports TeamSite Templating Java in addition to TeamSite Templating Browser. If TeamSite Templating Java is supported, those who are logged in as Editor, Master, or Administrator may switch between the Java and the browser interfaces using TeamSite WebDesk Pro. From a workarea view in WebDesk Pro, navigate to a templating directory. Click **View > Change Templating UI**. You are prompted with a message identifying the new interface.

The first time you access a data capture form using the Java interface, you are prompted to install the Java client software on your computer. If a newer version of the Java interface application becomes available, you are prompted to install it. See Appendix B, "Installing TeamSite Templating Java for Clients."

Accessing TeamSite Templating

You can create a new data record by accessing the TeamSite Templating interfaces in any of these ways:

- From TeamSite WebDesk.

  In the **Files** tab, select **Browse > Categories**. The left pane of the Files screen shows the available TeamSite templating categories and types. Highlight a template type and select **New** to create a new data content record.

  From other browse views, select **Files > New Record**. A dialog box asks you to select a templating category and type.

- From TeamSite WebDesk Pro.

  Click **File > New Data Record**. A dialog box asks you to select a templating category and type.

- From a task in WebDesk or WebDesk Pro.

  If an assigned task asks you to create or edit data content records, you can do so by responding to the task request.

- Through the Content Contributor Interface that provides a URL to access TeamSite Templating.

  You may receive an email that contains a URL to access TeamSite Templating. You may also encounter a URL on an internal Web site that links you to TeamSite Templating. Clicking on the URL will take you to the appropriate location in TeamSite Templating. If you are not already logged on to TeamSite, you will see a logon screen first.

- From the SmartContent™ Editing tab.

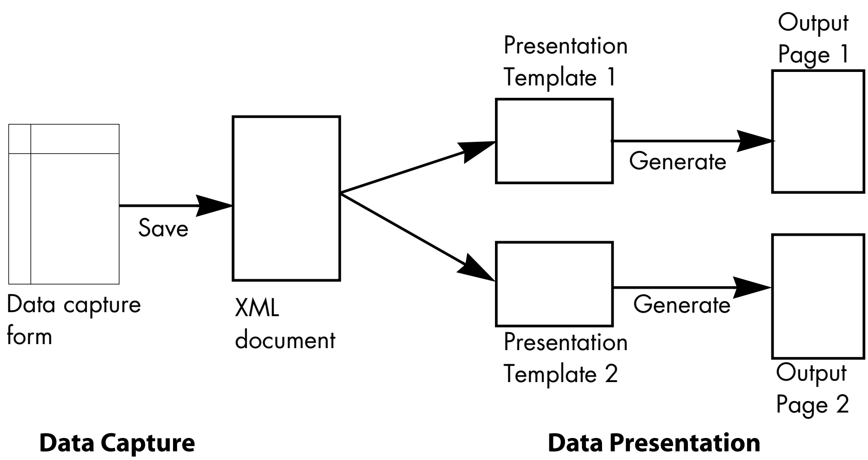
  Select **New Record** to create a data content record.

Concepts and Definitions

The following sections define key TeamSite Templating concepts and terms. Italicized items are explained in detail in their own sections. See the diagram on page 9 for more information about how these items interact with each other.

TeamSite Templating Model

TeamSite Templating is based on two overall concepts: *data capture* and *data presentation*. The following diagram and sections provide a high-level overview of this architecture.



Using TeamSite Templating to Create Web Output

Data Capture

Data capture occurs when you enter and save data. You enter data into TeamSite Templating by selecting and filling in a form based on a *data capture template (*this form is displayed in the data content record window). The captured data is saved as an XML document, which is stored as a *data content record* in the TeamSite file system. Stored data is used to fill in *presentation templates* to generate multiple renderings of the content, including for the Web and wireless devices.

Data Presentation

After data is captured and stored as a data content record, you can combine the data content record with a presentation template. The result is a generated output file that displays the data content as defined by the presentation template. The generated output file can optionally be deployed to a production Web server through OpenDeploy.

Definitions

The following sections define key TeamSite Templating terms. Data capture templates and presentation templates are designed by one or more template developers at your site. Template developers are familiar with XML and programming languages.

Data Category and Type

TeamSite Templating organizes data based on category and type. Data categories are at the top level of the data organization hierarchy. Each data category contains one or more data types, which represent more specific groupings of data. For example, the data category `beverages` could contain the data types `tea`, `coffee`, `milk`.

Data Capture Template

A *data capture template* defines the structure of the data capture form that you use to enter data. A data capture template is associated with a data category and type. The data category and type define what needs to be entered into the data capture template. The data that you enter is saved in the TeamSite file system in the form of a data content record. See Chapters 2 and 3 for information on entering data in forms based on the data capture templates.

Data Content Record

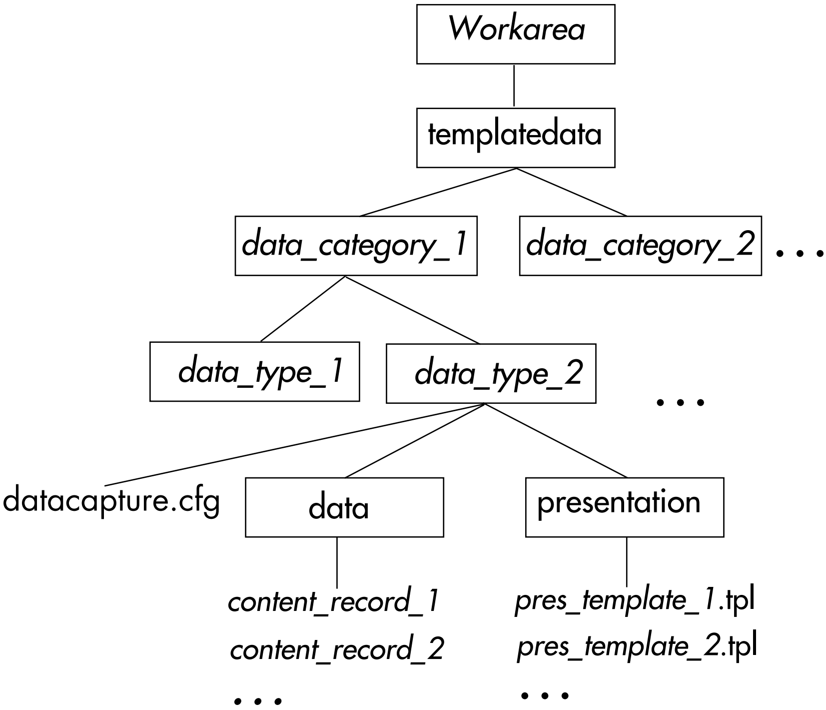
A *data content record* contains the data entered for a specific category and type using TeamSite Templating. You name a data content record when you save it. A data content record is an XML document whose elements can be saved in a relational database using Interwoven's DataDeploy Database Auto-Synchronization.

Presentation Template

A *presentation template* is an XML file that defines how captured data will appear when displayed. A presentation template is "populated" with an existing data content record plus any additional information that may be stored in a database. You can use any available data content record to populate a presentation template that has been configured for that data type. You can also use a single data content record to populate more than one presentation template, resulting in a different look and feel for the same data content record, including versions for your internet and wireless Web sites. See "Generating Output" on page 25 or page 42 for information about how to combine a data content record with a presentation template to create an output file.

Data Storage Hierarchy

TeamSite Templating uses a data storage hierarchy based on data *categories* and *types*. The directory structure supporting this hierarchy resides in the workarea for each TeamSite Templating user. The directory structure is as follows. Items in boxes are directories; items not in boxes are files. Values in italics are variables used by your installation.

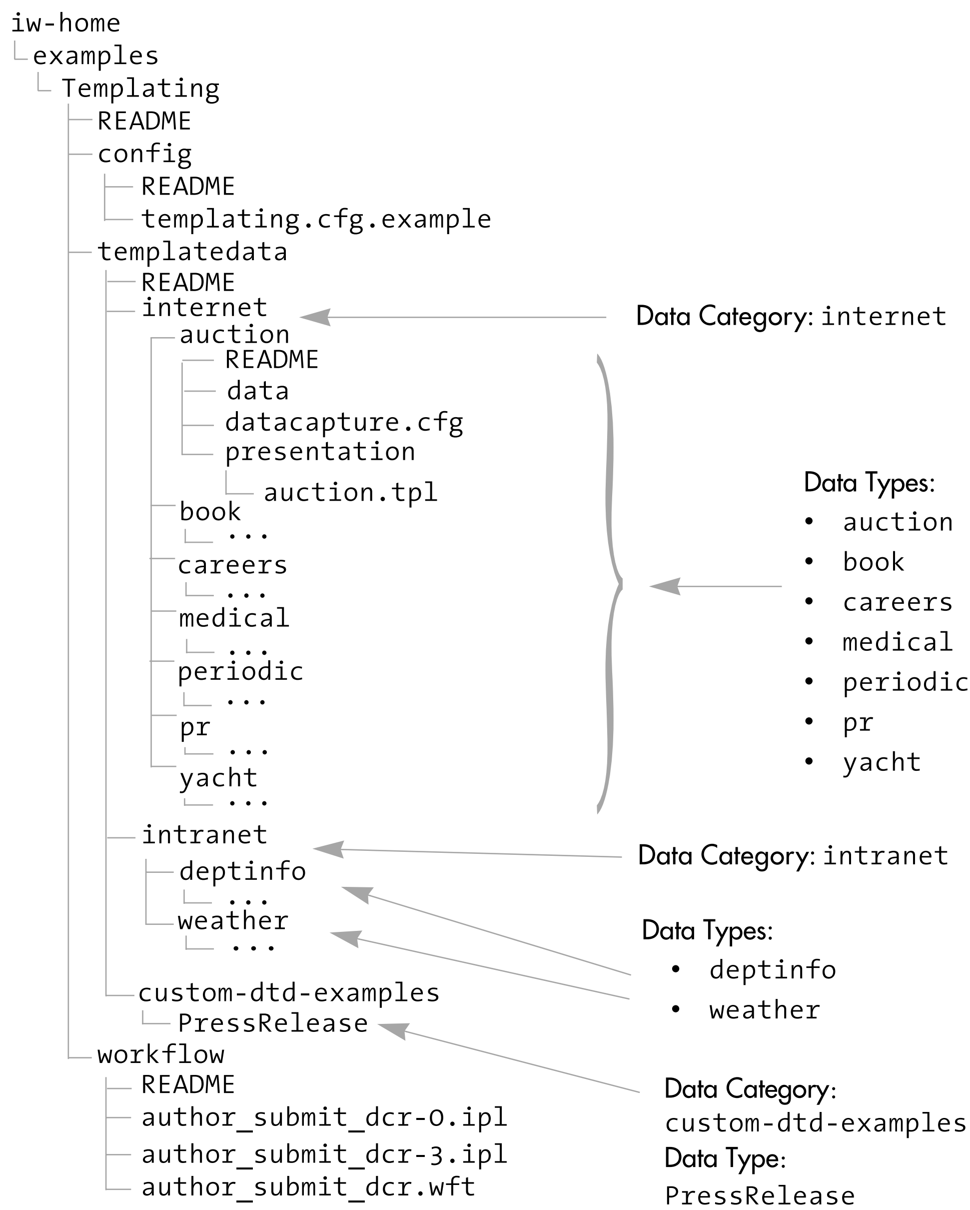


TeamSite Templating Directory Structure

The `templatedata` directory is at the highest level in the TeamSite Templating hierarchy within the workarea. (This directory name may be different in your environment.)

Data categories are at the next level in the hierarchy and contain one or more data types. Each data type directory contains the subdirectories `data` and `presentation` as well as other files. The data content records you create are stored in the `data` directory or a subdirectory of `data`. The presentation templates you can use are stored in the `presentation` directory.

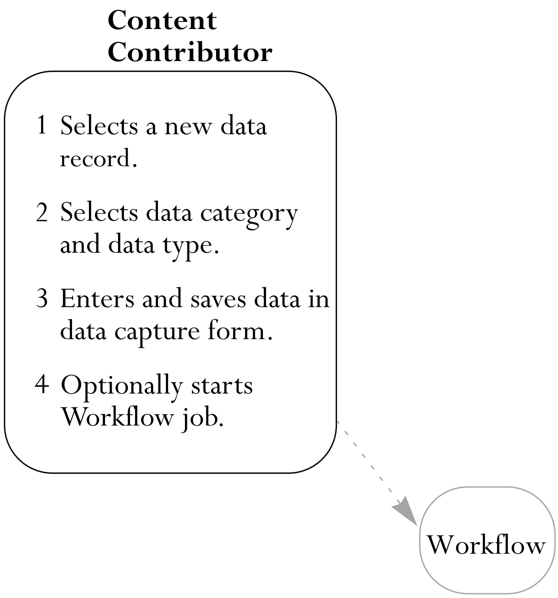
The following directory structure is created by default when TeamSite Templating is installed. The examples in this manual are based on this directory structure. While your directories will be different, this provides an example of how TeamSite Templating directories are structured.



Example TeamSite Templating Directory Structure

Process Flow: Creating a New Data Content Record

The following diagram shows the actions that take place when you create a new data content record. Sections following the diagram explain each step.



1. A content contributor clicks **File** > **New Data Record** in WebDesk Pro or **File** > **New Record** in WebDesk or accesses TeamSite Templating through another method. TeamSite Templating displays the list of available data categories and types.

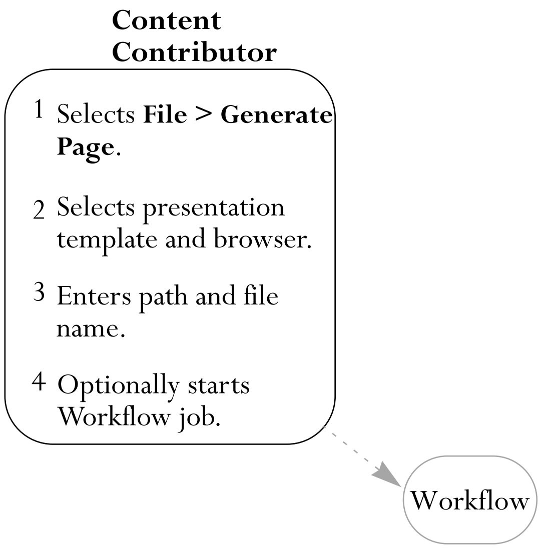
2. The content contributor selects a data category and data type. TeamSite Templating displays the data capture form in the data content record window.

3. The content contributor enters data in the data capture form and selects **File** > **Save**. Using the data provided by the content contributor, TeamSite Templating writes a data content record to the `data` subdirectory (or to a subdirectory of `data`) in the TeamSite workarea.

4. If creating the data content record is a task associated with a TeamSite Workflow job, the user is prompted to start (or continue) the workflow when the data content record is closed.

Process Flow: Generating a Web File

The following diagram shows the actions you perform when you generate a new Web file by populating a presentation template with a previously captured data content record. Sections following the diagram explain each step.



1. A content contributor clicks **File > Generate Page** in the TeamSite Templating Java or clicks **Generate** in Team Site Templating Browser. The Preview/Generate Output dialog box displays. The dialog box contains the name and file name of the appropriate presentation templates.
2. The content contributor selects a presentation template and clicks **Generate**. The Select Output File dialog box displays.
3. The content contributor provides a path and file name to save the generated page. TeamSite Templating generates the Web page by populating the selected presentation template with data from the selected data content record. The Web page is saved and displayed in a browser.
4. If creating the generated Web file is a task associated with a TeamSite Workflow job, the user is prompted to start (or continue) the workflow once the Web file is generated.

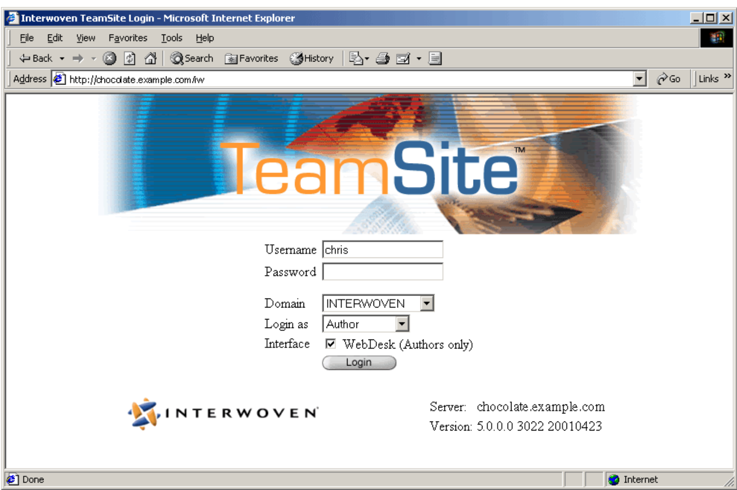
Chapter 2

Using TeamSite Templating Browser

The TeamSite Templating Browser software allows you to create data content records and merge the records with presentation templates to generate output files (such as HTML files). Those procedures are described in this chapter. You can access TeamSite Templating Browser through both WebDesk and WebDesk Pro. Unless otherwise specified, the sample screens, windows, and dialog boxes shown in this chapter use WebDesk to access TeamSite Templating Browser. To see the screens that display in WebDesk Pro, refer to Chapter 3, "Using TeamSite Templating Java."

Accessing TeamSite Templating Browser

1. Log on to TeamSite WebDesk through your browser by entering `http://TeamSite_hostname/iw`. The TeamSite login screen displays.



TeamSite WebDesk Login Screen

2. In the TeamSite login screen:

   a. Select your user type as Author using the pull-down menu. Authors are the only users who have access to WebDesk.

   b. Enter your username and password and select your domain (if necessary) from the pull-down menu.

   c. Select the WebDesk check box.

   d. Click **Login**; the WebDesk window displays.

3. Click the **Files** tab and navigate to your workarea using the Navigation Window (the left pane on your screen).

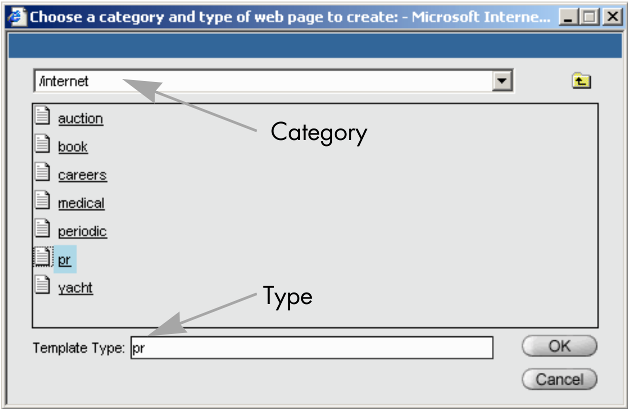
For additional information on TeamSite, refer to the TeamSite User's Guide.

Entering Data

To create a new data content record:

1. Click **Record > New Record** in the **Files > Categories** screen in WebDesk, or select **File > New Record** from any other **Files** screen in WebDesk.

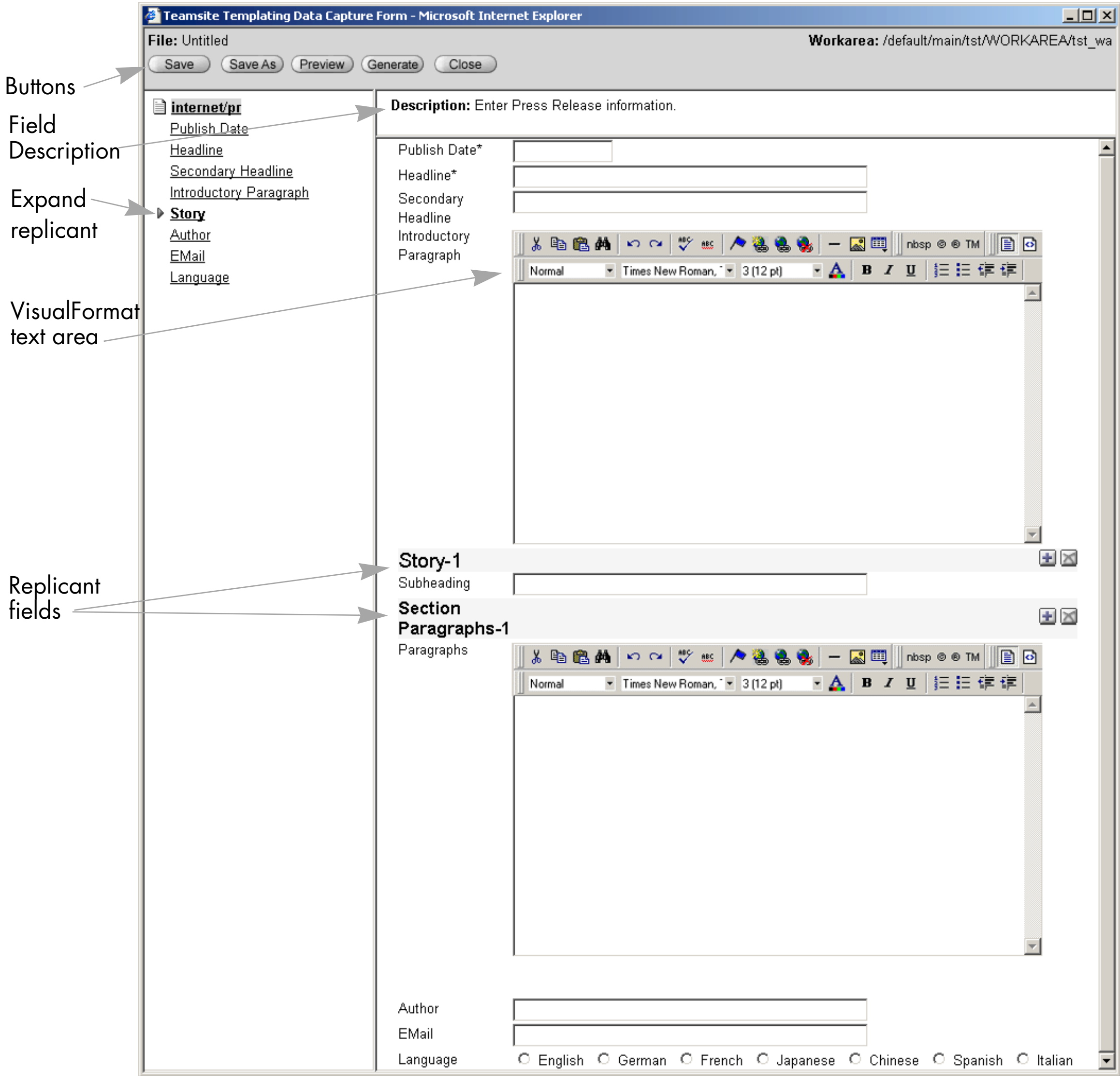
2. A window appears for you to select the category of data and the data type you want to enter.



The Choose a Category and Type Window

3. Select the category (in this example, `internet`) and data type (`pr`); click **OK**. You can also navigate to the category and type from **Files > Categories** and then click **New** to go directly to the data capture form.

4. The data capture form appears. Enter your data into the fields.



The PR Data Capture Form Shown in TeamSite Templating Browser

The tree in the left pane corresponds to the fields of the data capture form. You can click on a field name to move the cursor to that field. The tab key also moves you to the next field.

Fields marked with an asterisk (*) are required fields. Some fields, such as a date, may require a specific format. That format may be shown as the Description at the top of the data capture form (for example, the date format shown for the **Publish Date** field). If you enter invalid data in a field with a specific format or do not provide required data, the field name turns red when you try to save the data content record and a tool tip also displays to indicate the error. You cannot save a data content record until all required fields contain valid data.

The VisualFormat feature may be available in text areas. VisualFormat provides icons in the text area that allow you to format text. Refer to Appendix A, "Formatting Text," for information on using VisualFormat.

Some fields have an expand/collapse buttons in the left pane. These fields can be expanded to show the entire contents of the field or collapsed to show only the field label. These areas are referred to as replicants. The fields within a replicant can be duplicated or deleted using the **Insert** and **Delete** buttons. Fields can also be reordered using the **Move Up** and **Move Down** buttons (see page 22).

Some fields may have a **Browse** button next to them. Use this button to locate a file by:

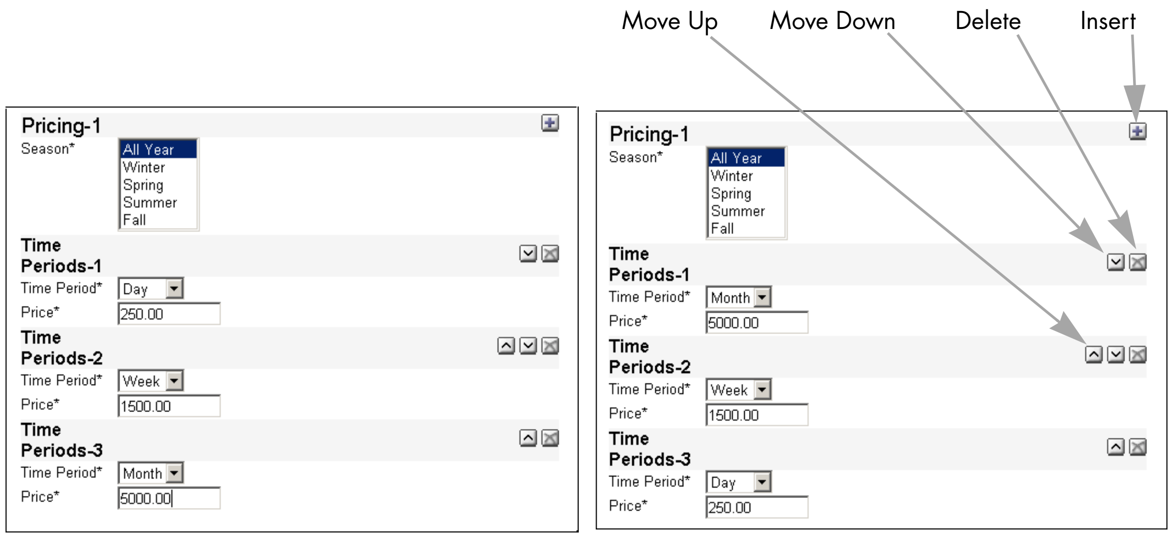
a. Clicking the **Browse** button; the Select File dialog box displays. The directory that displays was set up in the `datacapture.cfg` file that defines the data capture form.

b. Navigate to the file you want to use. The path to the file displays in the field in the data capture form.

5. When you finish entering data, save the data content record. Click **Save As** to display a Save dialog box; enter the file name of the data content record. Click **Save** if the data content record has already been named. Save displays a Save dialog box if the record has not been named yet. Saving a data content record does not automatically create a web page. You will need to generate the page in Templating or click the **Close** button from a task.

Working within Replicants

A replicant contains fields that can be duplicated within the data capture form. An example from the Yacht data capture form (which is included with the example files) shows setting different pricing for different time periods. This example added Time Periods 2 and 3. You can add additional replicants (Pricing) or fields within the replicant (Time Period). Click the **Insert** and **Delete** buttons to insert and delete fields. You can also reorder the fields within a replicant by clicking on the **Move Up** or **Move Down** arrow buttons.



Pricing replicant with two additional Time Periods added.

Rearranged the order of the Time Periods by clicking on Move Up or Move Down button.

Replicant in Data Capture Form in Browser Interface

To add additional replicants, click the **Insert** button to add a replicant below the selected replicant.

The number of replicants that can be added or deleted is specified in the data capture template. If you cannot insert or delete any more items, the buttons are disappear.

You can reorder fields within a replicant. To reorder replicants:

1. Click the **Move Up** button to move the replicant up.
2. Click the **Move Down** button to move the compound replicant down.

To delete replicants:

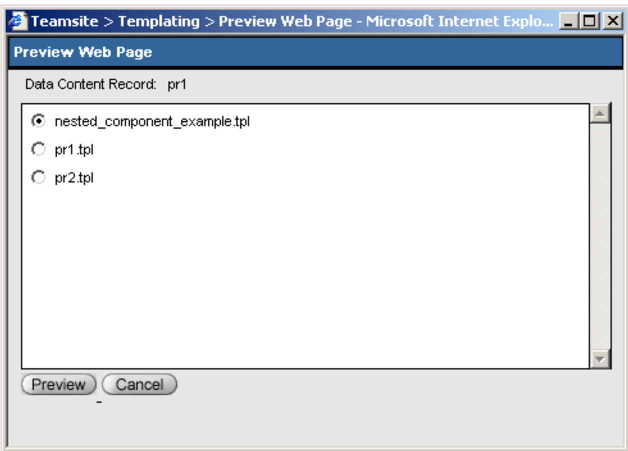
1. Click to select the replicant to be deleted.
2. Select the **Delete** button to remove the replicant. A deleted replicant cannot be undeleted.

Previewing Output

You can preview how your data will look with a particular presentation template. This combines your data content record with a presentation template for viewing but does not save the output file. Presentation templates are created by your TeamSite Templating developer to show different kinds of data in formats designed for that type of data.

To preview from data content record in WebDesk:

1. Save the data content record.
2. From a data capture form, click **Preview**.
3. The Preview Web Page window appears. Click to select the template you want to use with your data, and click **Preview**.



The Preview Web Page Window

4. Your data, combined with the selected template, appears in a browser window. When you have finished previewing, close the browser window.
5. If desired, select a different template to preview the data and click **Preview**. Otherwise, click **Cancel** to close the Preview Web Page window.

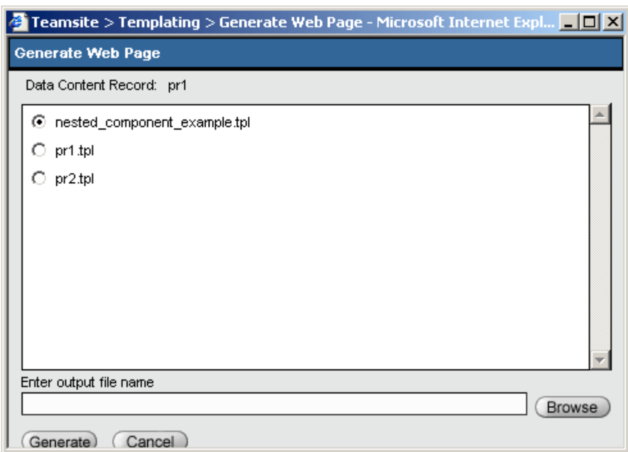
Note: If only one template is available for use with a specific data type, the Preview Web Page window does not appear. You go directly to the view of the output in a browser window.

Generating Output

A data content record is not directly viewable as a Web page. You must generate a viewable Web page from the data content record you created or edited. Because the data content record and the generated page are two distinct files, you must regenerate the Web page if you change the data content record. You generate a Web page by combining the data content record with a selected presentation template.

To generate a Web page in WebDesk:

1. From the saved data capture form, click **Generate**.
2. In the Generate Web Page window, select the presentation template you wish to use and enter the name of the file that you want to generate in the **Enter Output File Name** text box. Click **Generate**.



Generate Web Page Window

3. The page appears in a browser window, and the generated file is saved in the specified directory of your workarea.

You can generate Web pages using any combination of data content records and presentation templates that are configured for that data type. If you generate an output file and then want to change the template, just generate a new output file with a different presentation template and optionally delete the old output file.

Note: If only one template is available for use with a specific data type, the Generate Web Page window lets you name files, but does not provide for presentation template selection.

Editing Data Content Records

You can edit an existing data content record from TeamSite WebDesk using either of the following options:

- Navigate to the data content record you want to edit. Click the check box next to the name of the data content record. Select **File** > **Edit**.
- Click the **Edit** link in the **Action** column of the file you want to edit.

The data capture form appears, containing the existing data. You can change and save the data content record or save it as a new data content record by clicking **Save As**.

Deleting Data Content Records

To delete a data content record from WebDesk:

1. Navigate to the data content record you want to delete.
2. Turn on the check box next to the name of the data content record.
3. Select **File** > **Delete**.
4. A confirmation window appears. Click **OK**.

Viewing Data Content Records

You can view a data content record from the **Categories** view or the **Directories** view of the **Files** tab by clicking on the data content record file name. The data content record displays in a view window so you can see the values entered for the fields. You cannot modify the data content record.

Using Workflows

When workflows have been configured and the data content record is part of a workflow, you can initiate the workflow through TeamSite Templating. When you save and close a data content record or generate an output file, you are asked whether you want to start a workflow. If you start a workflow, you are asked to select a workflow. Workflows are started when you have a task to create a data content record or generate an output file. Click **Close** or **Finish** as appropriate to kick off a workflow.

Using Templating Browser from TeamSite WebDesk Pro

In addition to the **File > New Data Record** menu item that you use to create data content records, a number of other commands in WebDesk Pro provide access to TeamSite Templating data content records.

Viewing Data Content Records

To view an existing data content record from TeamSite WebDesk Pro:

1. Navigate to the data content record you want to view.
2. Turn on the check box next to the name of the data content record you want to delete.
3. Click **View File**.

The data content record is opened in read-only mode and **File > Save** from the Templating GUI is disabled. **File > Save As** is enabled so you can save the data content record under a new name and then modify it to create a different record.

Editing Data Content Records

To edit an existing data content record from TeamSite WebDesk Pro:

1. Select **Edit > Edit Data Record** or click the **Edit** button.
2. In the Open File dialog box, navigate to the data content record you want to edit; click **Open**.
3. The data capture form appears, containing the existing data.

Alternately, you can navigate through the directories in TeamSite to the appropriate data content record in the `data` subdirectory. Select the check box next to the name of the data content record you want to edit. Select **Edit > Edit Data Record** or click the **Edit File** button and the selected data content record displays.

Deleting Data Content Records

To delete a data content record from WebDesk Pro:

1. Navigate to the data content record you want to delete.
2. Select the check box next to the name of the data content record.
3. Select **File > Delete** or press the **Delete** key on the keyboard.
4. A confirmation window appears. Click **OK**.

Generating Web Pages

When generating Web pages, first make sure that no items are selected in the TeamSite WebDesk Pro.

To generate a Web page:

1. From WebDesk Pro, select **File > Generate Page**. A dialog box displays asking for the name of the data content record to be generated.
2. Enter or select the name of the data content record. The Generate Web Page dialog box displays. Follow the instructions provided in "Generating Output" on page 25.

Regenerating Web Pages

If the data content record or the presentation template used for a Web page has changed, you need to regenerate the Web page.

1. From WebDesk Pro, select the output file or files that you want to regenerate by clicking on the check box next to the filename, and select **File > Regenerate Page**.

   The selected files that were generated by TeamSite Templating are regenerated. Regenerating a file does not instantiate a new workflow job or add the file to an existing workflow task.

2. A success message appears. Click **OK**.

Note: The **Refresh** button in WebDesk Pro (or WebDesk) and the **Refresh** button in the Smart Context Editing tab have different functions than **File > Regenerate Page**; **Refresh** simply refreshes or redisplays the current window.

Searching Data Records

Data Record Search is available from WebDesk Pro when TeamSite Templating and DataDeploy are installed and configured.

You can search for data content records based on the data entered for them. For example, the form for creating a new press release data content record contains such entry fields as **Publish Date**, **Headline**, **Secondary Headline**, **Author**, **Email**, and **Language**. If you choose to search among the press release data types for a particular data record, your search form will display these fields.

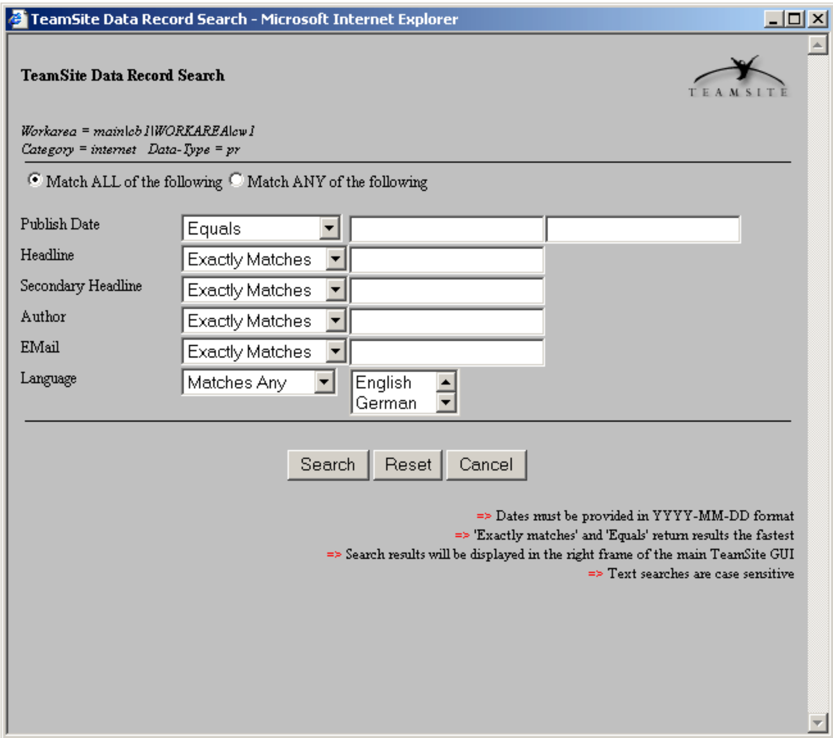
You begin a search by selecting a category and data type. Categories correspond to the directories where data capture templates are stored; data types correspond to data capture templates.

A Data Record search must be conducted within a workarea. You can initiate the search from anywhere within the workarea. The search is performed on data content records in the entire area and all subareas from which it was executed. For example, if you execute a search from `\default\main\www\WORKAREA\w1\templatedata\internet`, all files in `internet` and its subdirectories are searched. If you execute a search from `\default\main\www\WORKAREA\w1\templatedata\internet\pr`, all files in `pr` and its subdirectories are searched.

To search data content records through WebDesk Pro:

1. Navigate to the workarea where you want to search. Note that the place within the workarea is irrelevant; the search continues through the category you choose regardless of where in the workarea you initiate the search.
2. Select **View > Search Data Records**.
3. In the Data Record Search window, select the data category and the type.
4. Click **Continue**.

The Data Record Search window appears in a new browser window. Notice that category name, data type, and workarea path name are displayed above the search criteria.



TeamSite Data Record Search Window (WebDesk Pro)

5. Decide whether you want your search to match all of the items you set or any of the items.

6. Set the criteria for your search. You may set just one or several search criteria. Focus your search by selecting operators from the drop down menus (refer to "Search Criteria") and then providing values.

7. After you set your criteria, click **Search**.

The results display in the right frame of WebDesk Pro. The results display in order by file name. Regardless of where you initiate your search, the relative path from the `templatedata` directory to the file is included in the file name. For example, a search that retrieves a file named `June_11` in the `pr` directory in the `internet` directory under the `templatedata` directory in a workarea displays the file as `/templatedata/internet/pr/data/June_11`.

Search Criteria

The following guidelines apply to data content record searches:

- The default is that records must match all of the criteria you specify. You may change the selection so that a record matches any of the specified criteria.
- Text fields are case-sensitive.
- Dates must be entered in YYYY-MM-DD format with dashes between year, month, and day.
- The pull-down for date fields allows you to select any of the following:
  - Equals
  - Does not equal
  - Between
  - Not between
  - Greater than
  - Greater or equal
  - Less than
  - Less or equal

  When you use the **Between** or **Not Between** operators for a numerical range, such as a date, you must enter a starting value in the first field and an ending value in the second. When you use operators other than **Between/Not Between**, you need only enter a value in the first field.
- The pull-down for text fields such as titles, descriptions, sources, and keywords allows you to select from the following:
  - Exactly matches
  - Does not match
  - Begins with
  - Ends with
  - Contains
  - Does not contain

- The pull-down for fields with selected choices (such as option buttons) allows you to select from the following:
  - Matches any
  - Matches all
  - Does not match

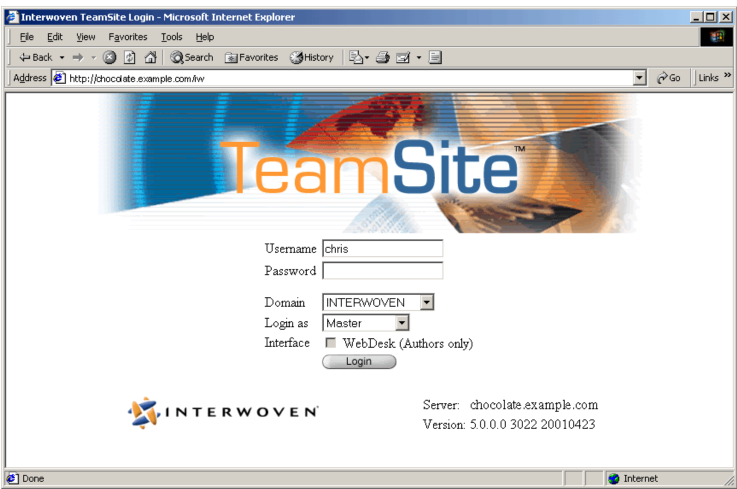
Chapter 3

Using TeamSite Templating Java

The TeamSite Templating Java software allows you to create data capture records and merge the records with presentation templates to generate output files. Those procedures are described in this chapter. You can access TeamSite Templating Java through both WebDesk and WebDesk Pro. Unless otherwise specified, the sample screens, windows, and dialog boxes shown in this chapter use WebDesk Pro to access TeamSite Templating Java. To see the forms that display in WebDesk, see "Using TeamSite Templating Browser" on page 17.

Accessing TeamSite Templating Java

1. Log on to TeamSite WebDesk Pro through your browser by entering `http://TeamSite_hostname/iw`. The TeamSite login screen displays.



TeamSite WebDesk Pro Login Screen

2. In the TeamSite login screen:

   a. Select your user type (Author, Editor, Administrator, or Master) using the pull-down menu.

   b. Enter your username and password and select your domain (if necessary) from the pull-down menu. Be sure the WebDesk check box is not selected.

   c. Click **Login**; the TeamSite window displays.

3. Click the **Workarea** button and navigate to your workarea using the Navigation Window (the left pane on your screen).

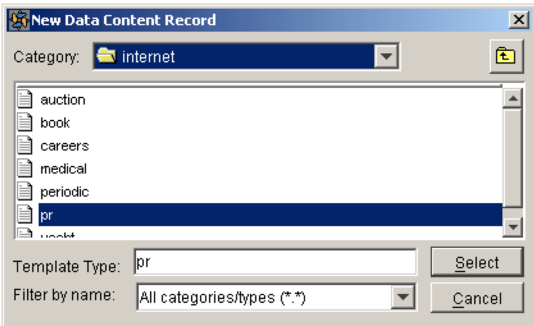
4. After navigating to your workarea, you may want to select **Edit > Set Home Page** to set TeamSite to automatically go to this workarea every time you log on.

For additional information on TeamSite, refer to the TeamSite User's Guide.

Entering Data

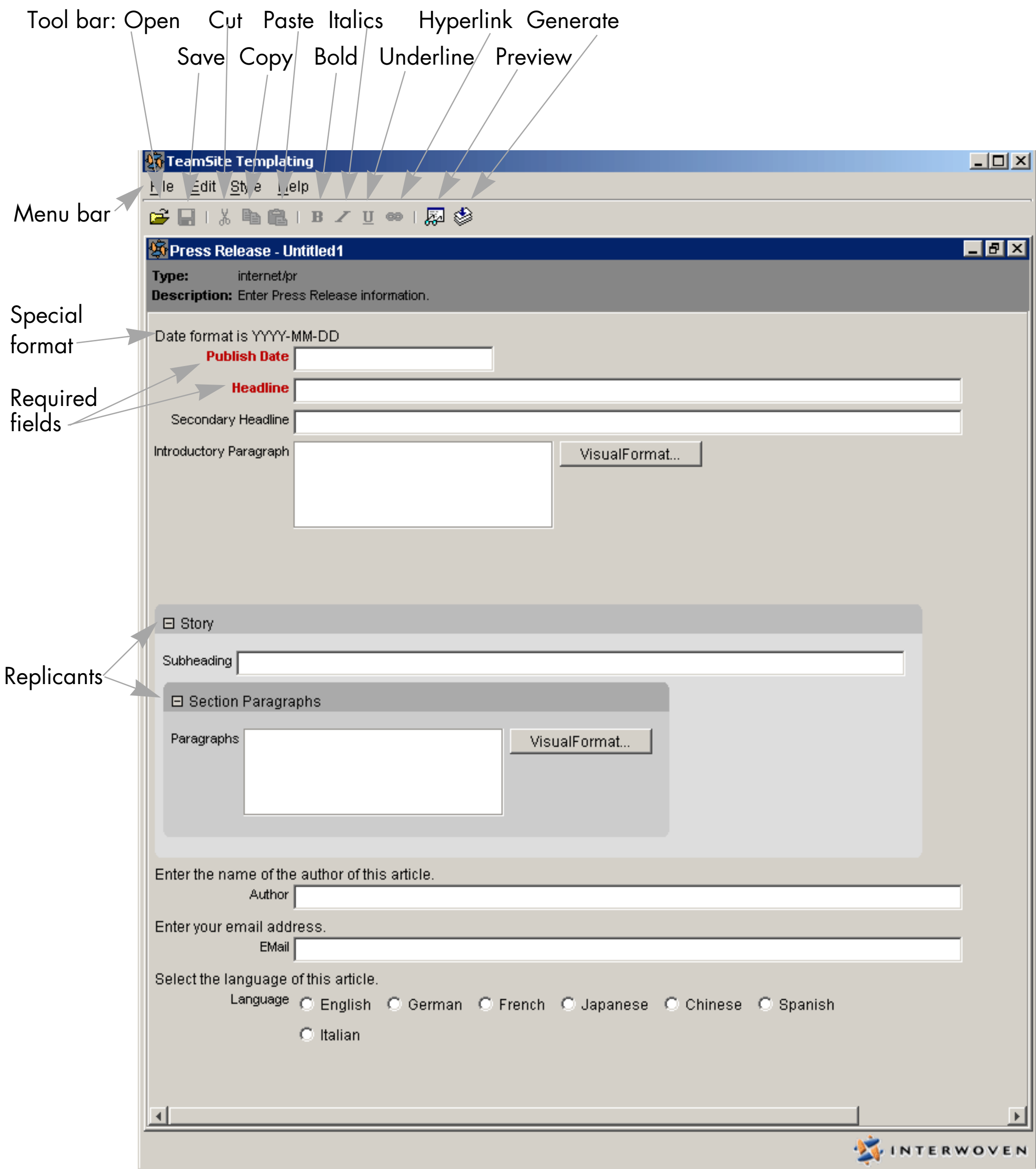
To create a new data content record:

1. In WebDesk Pro, select **File > New Data Record**; in WebDesk, select **File > New Record**.
2. A New Data Content Record dialog box appears. Select the category of data and the data type you want to enter; click **Select**.



New Data Content Record Dialog Box

3. The data capture form appears.



The PR Data Capture Form with TeamSite Templating Java

Fields with red labels are required fields. Some fields, such as a date, may require a specific format. If a field requires a specific format, that format may be shown above the field (for example, the date format shown above the **Publish Date** field). If you enter invalid data in a field with a specific format or do not provide required data, the field entry turns red when you try to save the data content record and a tool tip displays to indicate the error. You cannot save a data content record until all required fields contain valid data.

If they are active, you may use the **Cut**, **Copy**, and **Paste** commands in the **Edit** menu or on the tool bar to cut or copy information to the clipboard. You can paste it in another field or into another application. You may also copy information from another source and paste it into a data content record.

Many of the menu items have keyboard shortcuts; press the **Alt** key, then the underlined letters. For example, **Alt+F+O** is equivalent to **File > Open** and displays the Open File dialog box.

The VisualFormat feature may be available in text areas. When it is available, a button labeled **VisualFormat** is located to the right of the text area. When you click **VisualFormat**, a VisualFormat text area displays. You can enter text and apply styles to it. When you click **Done**, the text displays in HTML format in the original text area. If you make changes to the HTML text, the changes will display in the VisualFormat text area next time you open it. Refer to Appendix A, "Formatting Text," for information on using VisualFormat.

Some fields have an expand/collapse button in the upper left corner. These fields can be expanded to show the entire contents or collapsed to show only the field label. These areas are referred to as replicants. The fields within a replicant can be duplicated or deleted. Fields can also be reordered by dragging (see page 38).

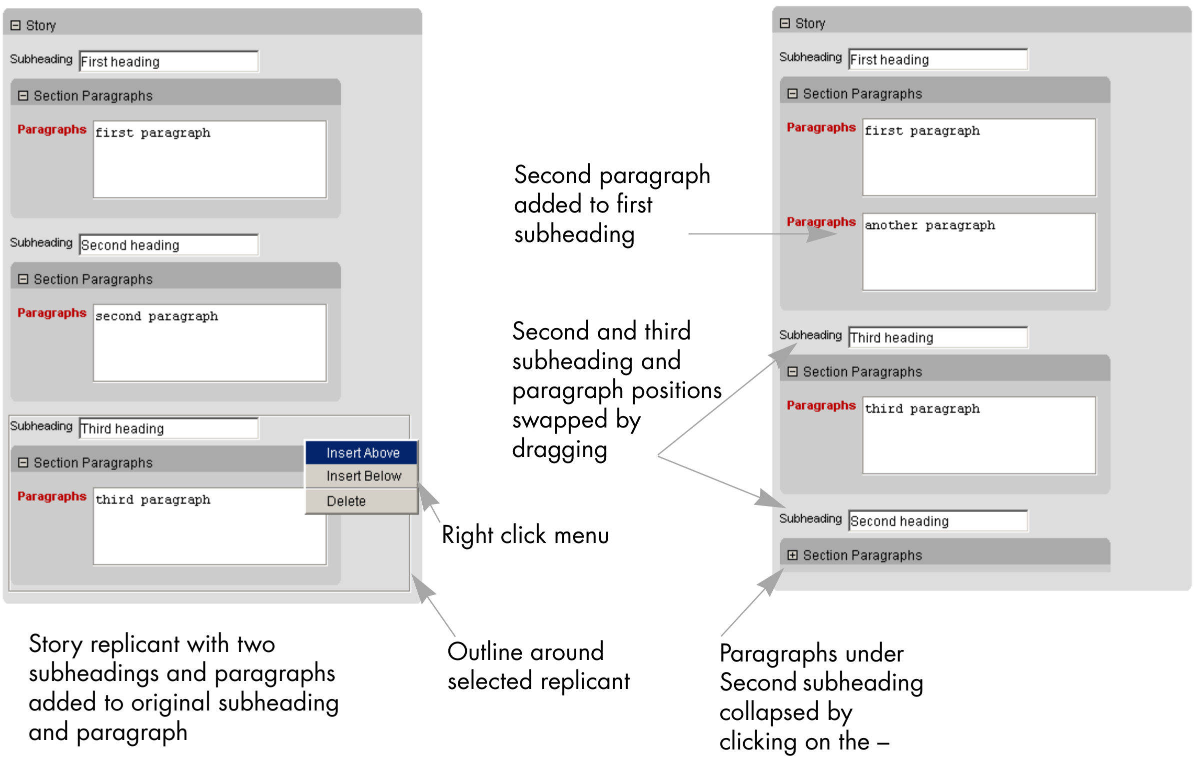
Some fields may have a **Browse** button next to them. Use this button to locate a file in your current workarea. Click the **Browse** button; the Select File dialog box displays. The directory that displays was set up in the `datacapture.cfg` file that defines the data capture form. Navigate to the file you want to use. If the selected file is a `.gif` or `.jpg` file, a thumbnail of the file displays in the Select File dialog box. The path to the file displays in the field in the data capture form.

4. When you finish entering data, save the form by selecting **File > Save As** or **File > Save** or by clicking the **Save** button (refer to page 40).

5. To preview your data with a presentation template, select **File > Preview Page** (refer to page 41 for details). To generate an output file, select **File > Generate Page** (refer to page 42).

Working within Replicants

A replicant contains fields that can be duplicated within the data capture form. For example, if you are preparing a press release, you would probably need to duplicate the **Subheading** and **Paragraphs** fields. You can add additional replicants or fields within the replicant. You can also reorder the fields within a replicant. The **Edit** menu is used within replicants to insert and delete fields. A right-click menu from within replicants also accesses these commands.



Replicants in a Data Capture Form

To add additional replicants:

1. Click to select the replicant to be duplicated. Because there may be replicants within replicants, be sure you have the correct one selected. You may find it helpful to click near the field name. An outline appears around the selected replicant.

2. Select **Edit > Insert Above** to add a replicant above the highlighted one. Select **Edit > Insert Below** to add a replicant below the highlighted one. You can alternately select **Insert Above** or **Insert Below** from the menu displayed by clicking the right mouse button within a replicant.

The number of replicants that can be added or deleted is specified in the data capture template. If you cannot insert or delete any more items, the menu items are dimmed.

You can reorder replicants or nested replicants within another replicant. To reorder replicants:

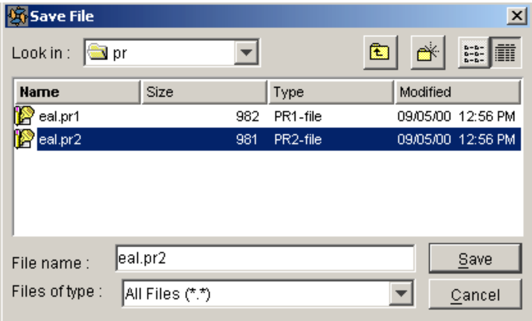
1. Click to select the replicant to be moved.
2. Drag the selected replicant to the new position.

To delete replicants:

1. Click to select the replicant to be deleted.
2. Select **Edit > Delete** (or select **Delete** from the menu displayed by clicking the right mouse button) to remove the replicant.

Saving Data Content Records

If you select **File** > **Save As** or if you select **File** > **Save** for a data content record that has not yet been saved, the Save File dialog box displays. Enter a file name and click **Save**. Once a data content record is saved, its name displays in the banner at the top of the data capture form.



Save File Dialog Box

The Save File dialog box and, similarly, the Open File dialog box provide several features.

- You can change information in the dialog box using the buttons in the upper right corner of the dialog box to:
  - Move up one level in the directory structure.
  - Create a new directory.
  - Display only the names of files.
  - Display the name, size, type, and date modified for files.
- You can rename a file by clicking the file name and typing a new name in the Name column.
- You can delete data content records by selecting the data content record and pressing the **Delete** key (on UNIX and PC keyboards). If you have a standard MacIntosh keyboard, this feature is not available.

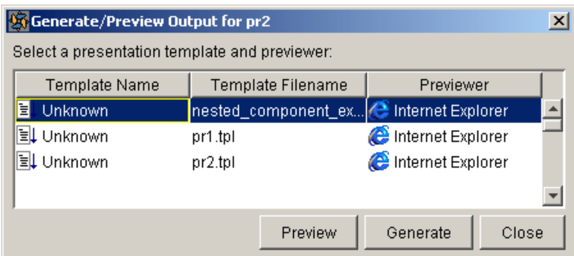
Previewing Output

You can preview how your data will look in a browser with a particular template. If you have not saved the data record, you will be prompted to do so before the file previews.

To preview the data content record:

1. From the data capture form, select **File** > **Preview Page**; the Generate/Preview Output dialog box displays.

   The left pane of the Generate/Preview Output dialog box lists the presentation template name; the center column lists the file name of the presentation template (*`file`*`.tpl`) that may be used with the selected data content record, and the right column lets you choose whether to display the output in an Internet Explorer or Netscape browser.



Generate/Preview Output Dialog Box

2. Highlight the presentation template you want to use.
3. Select a browser to be used for viewing the output.
4. To display the output in the select browser window, click **Preview**. Your data, combined with the selected template, displays. When you finish previewing, close the browser window.
5. The Generate/Preview Output dialog box remains open so you can select other presentation templates or other browsers. When you finish close the dialog box.

Generating Output

To generate an output file:

1. From the data capture form, select **File > Generate Page**; the Generate/Preview Output dialog box displays.

   The left pane of the Generate/Preview Output dialog box lists the presentation template name; the center column lists the file name of the presentation template (`*file*.tpl`) that may be used with the selected data content record, and the right column lets you choose whether to display the output in an Internet Explorer or Netscape browser.

2. Highlight the presentation template you want to use.

3. Select a browser to be used for viewing the output.

4. To generate and save the output file, click **Generate**. The Select Output File dialog box displays; enter the name of the generated file. The page appears in a file browser window (if it is not already displayed), and the generated file is saved in the specified location in your workarea.

5. The Generate/Preview Output dialog box remains open so you can select other presentation templates or other browsers. You can save multiple versions of the output file. When you finish, close the dialog box.

Editing Data

You can access data content records for editing from either TeamSite Templating Java or TeamSite WebDesk Pro. You can have multiple data content records open.

To edit an existing data content record from the TeamSite Templating Java:

1. With a data capture record open, select **File > Open**.

2. In the Open File dialog box, navigate to the data content record you want to edit; click **Open**.

3. The data capture form appears, containing the existing data. Edit this data as described in "Entering Data" on page 35. Then save and preview or generate the output.

Using Workflows

When workflows have been configured and the data content record is part of a workflow, you can initiate the workflow through TeamSite Templating. When you save and close a data content record or generate an output file, you are asked whether you want to start a workflow. If you start a workflow, you are asked to select a workflow. Normally you would start a workflow when you had a task to create a data content record or generate an output file.

Using Templating Java from TeamSite WebDesk

TeamSite Templating Java can also be accessed from TeamSite WebDesk. In addition to the **File > New Record** menu item that you use to create data content records, you can also edit, view, and delete data content records from TeamSite WebDesk. Other WebDesk features can also apply to data content records. For example, you can tag data content records or access data content records from tasks. Refer to the *TeamSite Author's Guide* for more information on WebDesk.

Editing Data Content Records

To edit an existing data content record from TeamSite WebDesk:

1. Navigate to the data content record you want to edit.
2. Select the check box next to the name of the data content record.
3. Select **File > Edit**.
4. The data capture form appears, containing the existing data.

You can also click the **Edit** link in the **Action** column of a specific data content record. The record will display in the TeamSite Templating Java or TeamSite Templating Browser, depending on which interface is selected.

Deleting Data Content Records

To delete a data content record from the TeamSite WebDesk:

1. Navigate to the data content record you want to delete.

2. Select the check box next to the name of the data content record.

3. Select **File > Delete**.

4. A confirmation window appears. Click **OK**.

Other Templating Features in TeamSite WebDesk Pro

In addition to the **File > New Data Record** menu item that you use to create data content records, a number of other commands available from TeamSite WebDesk Pro provide access to TeamSite Templating data content records.

Viewing Data Content Records

To view an existing data content record from TeamSite WebDesk Pro:

1. Navigate to the data content record you want to view.

2. Select the check box next to the name of the data content record you want to view.

3. Click **View File**.

The data content record is opened in read-only mode and **File > Save** from the Templating GUI is disabled. **File > Save As** is enabled so you can save the data content record under a new name and then modify it to create a different record.

Editing Data Content Records

To edit an existing data content record from TeamSite WebDesk Pro:

1. Select **Edit > Edit Data Record** or click the **Edit** button.

2. In the Open File dialog box, navigate to the data content record you want to edit; click **Open**.

3. The data capture form appears, containing the existing data.

Alternately, you can navigate through the directories in TeamSite to the appropriate data content record in the `data` subdirectory. Select the check box next to the name of the data content record you want to edit. Select **Edit > Edit Data Record** or click the **Edit File** button and the selected data content record displays.

Deleting Data Content Records

To delete a data content record from WebDesk Pro:

1. Navigate to the data content record you want to delete.
2. Select the check box next to the name of the data content record.
3. Select **File > Delete** or press the **Delete** key on the keyboard.
4. A confirmation window appears. Click **OK**.

Generating Web Pages

When generating Web pages, first make sure that no items are selected in the TeamSite WebDesk Pro.

To generate a Web page from WebDesk Pro:

1. From WebDesk Pro, select **File > Generate Page**. A dialog box displays asking for the name of the data content record to be generated.
2. Enter or select the name of the data content record. The Generate Web Page dialog box displays. Follow the instructions provided in "Generating Output" on page 42.

Regenerating Web Pages

If the data content record or the presentation template used for a Web page has changed, you need to regenerate the Web page.

1. From WebDesk Pro, select the output files to regenerate by clicking on the check box next to the filename, and select **File > Regenerate Page**.

   The selected files that were generated by TeamSite Templating are regenerated. Regenerating a file does not start a new workflow job or add the file to an existing workflow task.

2. A success message appears. Click **OK**.

Note: The **Refresh** button in WebDesk Pro (or WebDesk) and the **Refresh** button in the Smart Context Editing tab have different functions than **File > Regenerate Page**; **Refresh** only refreshes or redisplays the current window.

Searching Data Records

Data Record Search is available from TeamSite WebDesk Pro when you have TeamSite Templating and DataDeploy Database Auto Synchronization installed and configured to submit data content records to a database.

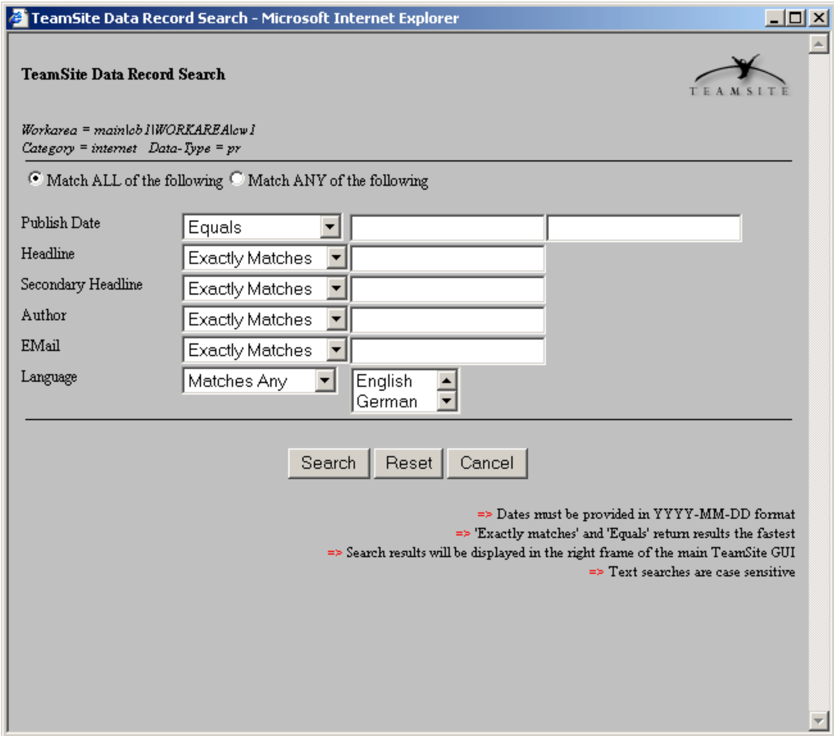
You can search for data content records based on the data entered for them. For example, the form for creating a new press release data content record contains such entry fields as Publish Date, Headline, Secondary Headline, Author, Email, and Language. If you choose to search among the press release data types for a particular data record, your search form will display these fields.

A Data Record search must be conducted within a workarea. You can initiate the search from anywhere within the workarea. The search is performed on data content records in the entire area and all subareas from which it was executed. For example, if you execute a search from `\default\main\www\WORKAREA\w1\templatedata\internet`, all files in `internet` and its subdirectories are searched. If you execute a search from `\default\main\www\WORKAREA\w1\templatedata\internet\pr`, all files in `pr` and its subdirectories are searched.

To search data content records through TeamSite WebDesk Pro:

1. Navigate to the workarea in which you want to search. Note that the place within the workarea is irrelevant; the search continues through the category you choose regardless of where in the workarea you initiate the search.
2. Select **View > Search Data Records**.
3. In the Data Record Search window, select the data category and type.
4. Click **Continue**.

   The Data Record Search window appears in a new browser window. Notice that category name, data type, and workarea path name are displayed above the search criteria.



TeamSite Data Record Search Window

5. Decide whether you want your search to match all of the items you set or any of the items.
6. Set the criteria for your search. You may set just one or several search criteria. Focus your search by selecting operators from the drop-down menus (refer to "Search Criteria") and then providing or selecting values.
7. After you set your criteria, click **Search**.

The results display in the right frame of the main TeamSite GUI. The results display in order by file name. Regardless of where you initiate your search, the relative path from the `templatedata` directory to the file is included in the file name. For example, a search that retrieves a file named `June_11` in the `pr` directory in the `internet` directory under the `templatedata` directory in a workarea displays the file as `/templatedata/internet/pr/data/June_11`.

Search Criteria

The following guidelines apply to data content record searches:

- The default is that records must match all of the criteria you specify. You may change the selection so that a record matches any of the specified criteria.
- Text fields are case-sensitive.
- Dates must be entered in YYYY-MM-DD format with dashes between year, month, and day.
- The pull-down for date fields allows you to select any of the following:
  - Equals
  - Does not equal
  - Between
  - Not between
  - Greater than
  - Greater or equal
  - Less than
  - Less or equal

  When you use the **Between** or **Not Between** operators for a numerical range, such as a date, you must enter a starting value in the first field and an ending value in the second. When you use operators other than **Between**/**Not Between**, you need only enter a value in the first field.
- The pull-down for text fields such as titles, descriptions, sources, and keywords allows you to select from the following:
  - Exactly matches
  - Does not match
  - Begins with
  - Ends with
  - Contains
  - Does not contain
- The pull-down for fields with selected choices (such as option buttons) allows you to select from the following:
  - Matches any
  - Matches all
  - Does not match

Appendix A

Formatting Text

TeamSite Templating supports two types of text formatting:

- RTF formatting allows you to select text and mark it as bold, italic, or underlined. You can also set hyperlinks on selected text.
- VisualFormat formatting provides more extensive formatting capabilities through buttons in the text field.

The type of formatting available in a particular text area is dependent on the following items:

- The type of client computer you are using. VisualFormat is only supported on Windows® operating systems.
- The type of formatting set up by the templating developer (person at your site who designed the appearance of your templates. RTF formatting is only supported for the Java interface.

Using RTF Formatting

For a Java interface user, RTF formatting can be active on any text area in a data capture form if RTF was specified by the developer.

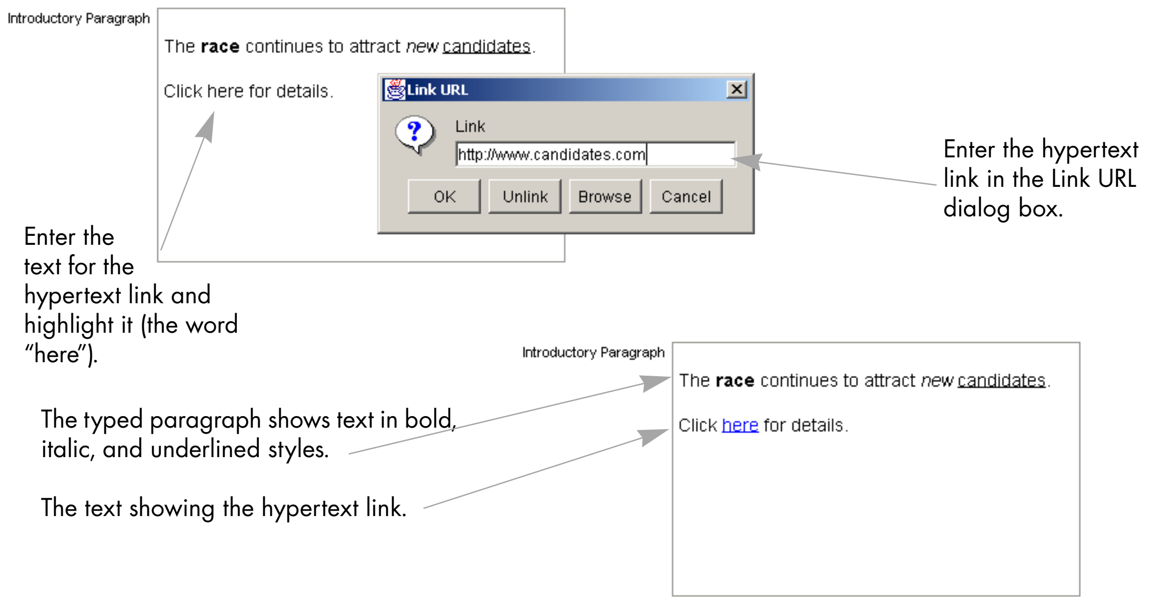
Specifying Text Styles

Text areas may have been set up by the template designer so you can mark text to be bold, italics, or underlined. When a text area accepts these text types, the buttons in the toolbar are active.

Highlight the text and click on the appropriate button from the toolbar to format the text. You can also select these items from the **Style** menu.

Creating Hypertext Links

To specify a hypertext link, enter the text you want to use as the link. Highlight the text and click the **Link** button (or select **Style > Link**). A dialog box displays so you can enter the URL to link to. When you click **OK**, the text you highlighted displays as a hypertext link.



Example Showing Text Area Styles and Links

Using VisualFormat

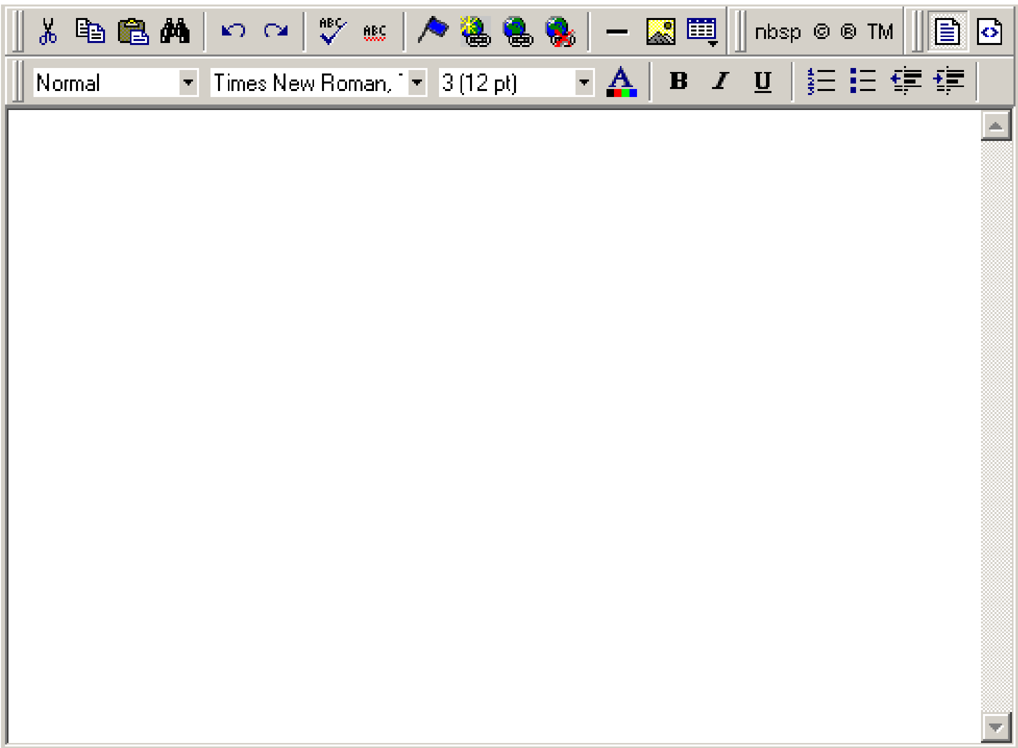
VisualFormat can be specified by template developers for text areas. The feature is only valid on client computers using Windows operating systems. If you are using a client computer on a different platform, RTF formatting may be available.

When you install the TeamSite Templating Java software, the VisualFormat software is installed at the same time. In the browser interface, the first time you open a data capture form that uses VisualFormat, you are prompted to install the VisualFormat application.

When you are using TeamSite Templating Browser with a Netscape browser or are using TeamSite Templating Java with either Netscape or Internet Explorer, click the **VisualFormat** button to access VisualFormat for the adjacent text area. When you click **Done**, the text you entered and formatted displays in HTML format in the text area of the data capture form.

For TeamSite Templating Browser using Internet Explorer, the VisualFormat editor displays as part of the data capture form itself.

The default use of VisualFormat results in a text area with toolbars at the top, as shown in the following figure:



VisualFormat Used in a Text Area

Summary of VisualFormat Buttons

The following table shows all the buttons that are available within VisualFormat.

Button	Keyboard Shortcut (Internet Explorer)	Function
Cut	Ctrl+X	Remove selected text and graphics. Place that data into temporary memory, also known as the *clipboard*. (If you later cut or copy more information onto the clipboard, the new information overwrites the original information.)
Copy	Ctrl+C	Copy selected text and graphics onto the clipboard. Leave the selected data where it is. (If you later cut or copy more information onto the clipboard, the original information is lost.)
Paste	Ctrl+V	Insert the most recently cut or copied text and graphics at the current cursor location.
Find	Ctrl+F	Search for text on the page.
Undo	Ctrl+Z	Reverse the most recent action, as if it had never occurred. You can undo as many actions as you wish.
Redo	Ctrl+Y	Reverse the undo action.
Spelling Checker (manual)		Begin spelling checker. Requires Word for Windows 2000.
Spelling Checker (automatic)		Turn on or off spelling check as-you-type feature. Requires Word for Windows 2000.
Bookmark		Create a bookmark.
Insert Hyperlink		Insert a new hyperlink.
Edit Hyperlink		Edit a hyperlink.
Remove Hyperlink		Remove a hyperlink.

Button	Keyboard Shortcut (Internet Explorer)	Function
Horizontal Line		Insert a horizontal line across the text area.
Picture		Insert a picture from your workarea.
Table		Insert or edit a table.
Table Borders		Display table borders while in edit mode if the table's border size is set to zero (0).
Show Invisible Elements		Display some characters that do not appear when the user views the page, such as end of line characters. Clicking this button does not display characters that indicate a bookmark.
View as WYSIWYG		Display the content on the page as WYSIWYG (What You See Is What You Get). WYSIWYG is the ability to see in the editor exactly what will appear when user views the Web page.
View as HTML		Display the content on the page as HTML.
View Preferences		Display a dialog box that lets you set default values for font, color, and size when viewing as HTML. These settings are ignored when you view as WYSIWYG or when the user views your Web page. This button is active only when the View as HTML button is pressed.
nbsp		Insert a blank space character. Although you can add spaces in the editor using the spacebar on the keyboard, those spaces are ignored by a browser when it displays a page.
Copyright		Insert copyright symbol.
Registered Trademark		Insert registered trademark symbol.

Button	Keyboard Shortcut (Internet Explorer)	Function
TM		Insert trademark symbol.
Font		Change the font. Your template developer determines which fonts are available.
Font Size		Change the font size. Your template developer determines which font sizes are available.
Heading Size		Change the heading size. Your template developer determines which heading sizes are available.
Bold	Ctrl+B	Make the text **bold**.
Italic	Ctrl+I	Make the text *italic*.
Underline	Ctrl+U	Make the text underlined.
Font Color		Change the font color.
Number		Begin the line on which the cursor is resting with a number. If the line above this line is: • Not numbered, assign this line 1. • Numbered, assign a number one more than the line above.
Bullet		Begin the line on which the cursor is resting (or all selected lines) with a bullet (•).
Indent		Increase or decrease the current line's distance from the left margin.
Left, Center, and Right Justify		Align text so that it is arranged: • Evenly on the left side (uneven on the right). • In the center of each line. • Evenly on the right side (uneven on the left).

Customizing Your Toolbar

The VisualFormat toolbar actually consists of one or more toolbars. Each toolbar has one or more buttons.

You can recognize the beginning of a toolbar by the double vertical bars (circled in the illustration).

Sample VisualFormat Toolbar Made up of Four Toolbars

Your template designer determines:

- Which toolbars are available to you.
- Which commands appear on each toolbar, and the sequence in which they appear initially.
- Whether you are authorized to customize your toolbar. If you are not authorized, your edits are not saved when you close the data capture form.

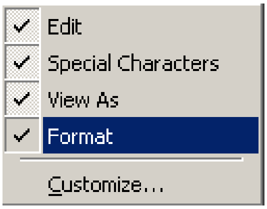
If you are authorized to customize your toolbar, you can:

- Remove or add available toolbars.
- Create a new toolbar.
- Rearrange buttons on a toolbar.
- Change the orientation of a toolbar.

Removing Or Adding Toolbars

To remove or add toolbars, follow these steps:

1. With the cursor in the toolbar, right-click the mouse to display a menu listing all available toolbars and the **Customize** option.



   Checked toolbars currently appear in your data capture form.

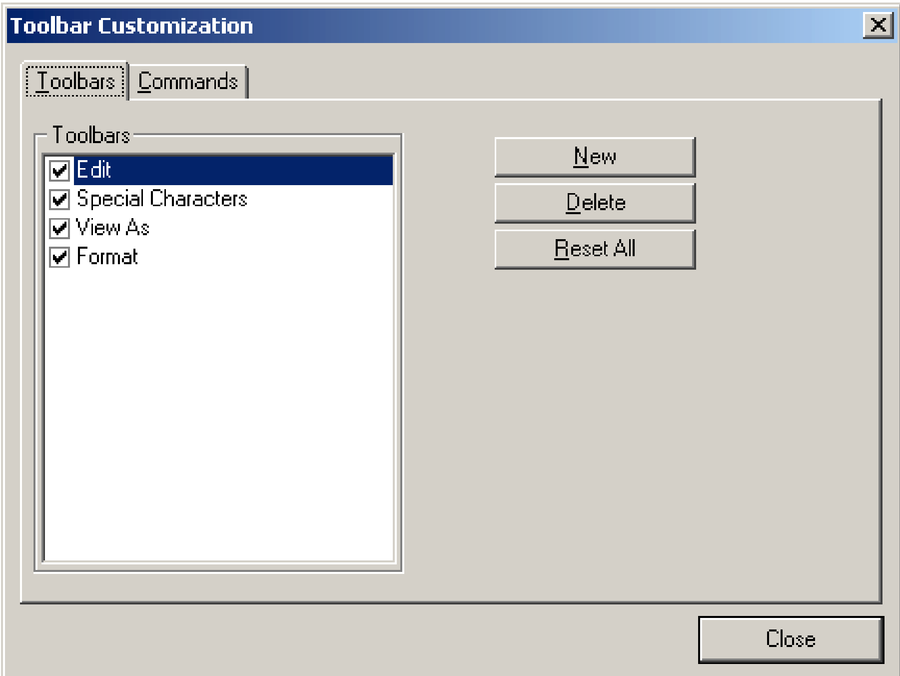
   In this example, the **Special Characters**, **View As**, **Format,** and **Paragraph Format** toolbars appear. The **Edit** toolbar, which is not checked, is available but does not currently appear on the toolbar in the form.

2. Select or deselect the check box in front of the toolbar name.

Creating a New Toolbar

1. With the cursor in the toolbar, right-click the mouse to display the menu listing available toolbars and the **Customize** option.

2. Click **Customize**. The Toolbar Customization dialog box appears.



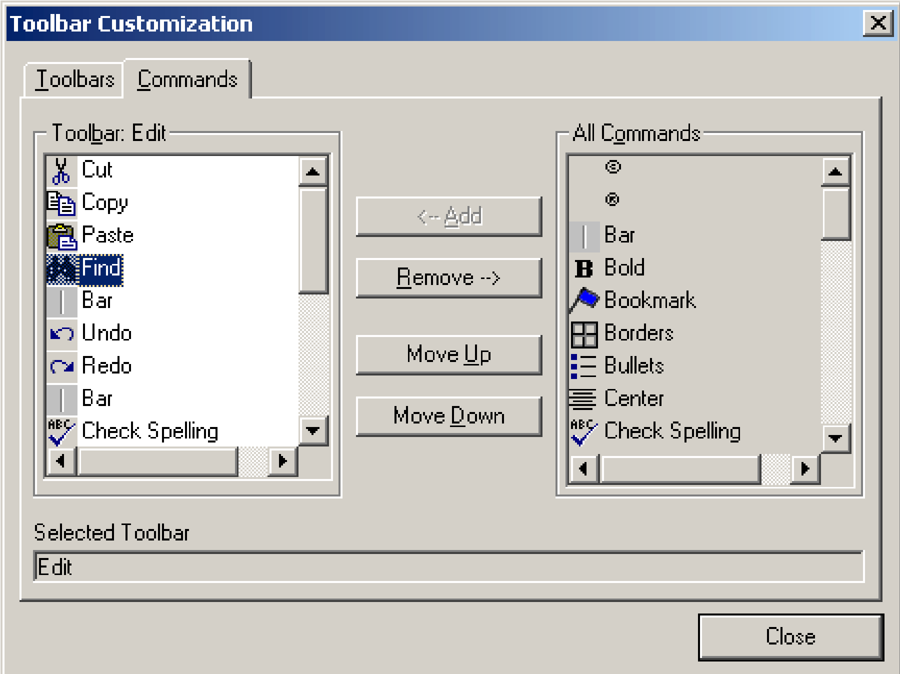
3. Click **New**. A new menu appears in the Toolbar field, above the existing toolbars. The default name of the new toolbar is `Custom 0`.

4. To rename the toolbar, place the cursor in the name and enter the new name.

Note: If you click outside the toolbar name field, you cannot change the toolbar name later.

5. To include the toolbar in your data capture form, click in the check box to the left of the toolbar name.

6. Click the **Commands** tab to add buttons to the toolbar.



The **Toolbar** field in the Commands window shows the title of the new toolbar and lists the buttons in the sequence in which they appear on the toolbar. The **All Commands** field lists all available buttons.

To add a button to the toolbar, drag it from the **All Commands** field to the **Toolbar** field to the position where you want it to appear. (You can also highlight an icon and click **Add**. This action places the icon at the bottom of the list.)

To remove a button from the toolbar, drag it from **Toolbar** field to the **All Commands** field. (You can also highlight an icon and click **Remove**.)

The **Move Up** and **Move Down** buttons let you move any button up or down one position within the list of buttons. Highlight the button and then click **Move Up** or **Move Down**.

Rearranging the Toolbars

To move a toolbar to a different location:

1. With the cursor on the double vertical bars, click the mouse and hold down the mouse button.
2. Drag the toolbar to a new location. You can move the toolbar anywhere else in the toolbar area.
3. Release the mouse button.

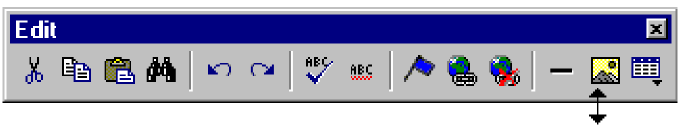
Note: Your system administrator can define a toolbar so that it cannot reside on the same row with another toolbar. If you move such a toolbar, it will not remain where you placed it; instead, it will move down to the next row.

You can also move the toolbar completely off the data capture form by dragging it anywhere on your computer screen.

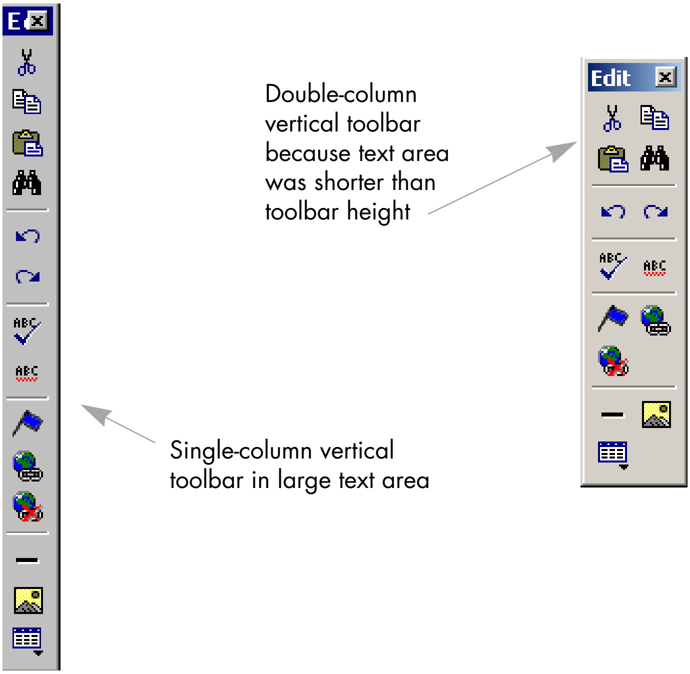
Changing the Orientation of a Toolbar

You can change the orientation of a toolbar from horizontal to vertical by performing these steps:

1. Drag the menu from the toolbar into the text area.
2. Move the cursor to the bottom of the menu until it becomes a double-headed arrow.



3. Drag the cursor down and to the left. As you do, the toolbar's orientation changes from horizontal to vertical. The vertical display may have multiple icons in each horizontal row because the length is limited by the height of the text area.



You can close the toolbar by clicking on the **X** in the upper right corner or you can drag it back to horizontal placement within the toolbar area.

Appendix B

Installing TeamSite Templating Java for Clients

The TeamSite Templating Java client software must be installed on your computer before you can begin creating and editing data content records. Your computer is referred to as a TeamSite Templating client. The following sections describe how to install the TeamSite Templating Client software on different computer platforms using either an Internet Explorer browser or a Netscape browser.

Installing on Windows Platforms Using Internet Explorer

1. Log on to TeamSite through Internet Explorer® (see Chapter 3, "Using TeamSite Templating Java").
2. Navigate to your workarea.
3. Select **File > New Data Record**. A message displays telling you that TeamSite Templating is not installed on your computer.
4. Click **Install** to start the software installation.
5. The install program displays with a button labeled **Start Installer for Windows 95, 98, NT**. Verify that the **Include VM in download** check box is checked.
6. Click the **Start Installer** button. Normally you should accept the defaults and click **Next** to continue through the installation program.
7. Click **Done** when installation finishes. Close the browser window containing the installation program.

A security warning window pops up before use of TeamSite Templating if "Always trust Interwoven" was not previously checked on the client computer.

When you complete the installation, the New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in Chapter 3, "Using TeamSite Templating Java."

Note: If you are prompted to update your version of TeamSite Templating Java, proceed with the installation. When the installation completes, you will need to reselect the action (such as **File > New Data Record**) to continue.

Installing on Windows Platforms Using Netscape

1. Log on to TeamSite through Netscape®(see Chapter 3, "Using TeamSite Templating Java").
2. Navigate to your workarea.
3. Select **File > New Data Record**. A message displays telling you that TeamSite Templating is not installed on your computer.
4. Click **Install** to start the software installation.
5. One or more Java digital security screens display. These screens indicate that a Java application wants to download and execute the install program on your computer. Click **Grant** on each screen to continue.
6. The install program displays with a button labeled **Start Installer for Windows 95, 98, NT**. (Also use this for Windows 2000.) Verify that the **Include VM in download** check box is checked.
7. Click the **Start Installer** button. Normally you should accept the defaults and click **Next** to continue through the installation program.
8. Click **Done** when the installation finishes. Close the browser window containing the installation program.

Additional Java digital security screens may display. Again, click **Grant** to continue. You may see these screens whenever you restart TeamSite Templating. If desired, you may turn on the check box to remember these permissions.

When you complete the installation, the New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in Chapter 3, "Using TeamSite Templating Java."

Note: If you are prompted to update your version of TeamSite Templating Java, proceed with the installation. When the installation completes, you will need to reselect the action (such as **File > New Data Record**) to continue.

Installing on Solaris Platforms Using Internet Explorer

Note: Before attempting to install on Solaris version 2.6 or earlier, install the Solaris patches that allow you to run Java 1.3.

1. Log on to TeamSite through Internet Explorer (see Chapter 3, "Using TeamSite Templating Java").
2. Navigate to your workarea.
3. Select **File > New Data Record**. A message displays telling you that TeamSite Templating is not installed on your computer.
4. Click **Install** to start the software installation.
5. The install program displays with a button labeled **Start Installer for Solaris Sparc**. Verify that the **Include VM in download** check box is checked.
6. Click the **Start Installer** button. Normally you should accept the defaults and click **Next** to continue through the installation program.
7. Click **Done** when installation finishes. Close the browser window containing the installation program.

When you complete the installation, the New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in Chapter 3, "Using TeamSite Templating Java."

To preview the data content record from a Solaris client, you should include the browser path in your PATH variable.

Note: If you are prompted to update your version of TeamSite Templating Java, proceed with the installation. When the installation completes, you will need to reselect the action (such as **File > New Data Record**) to continue.

Installing on Solaris Platforms Using Netscape

Note: Before attempting to install on Solaris version 2.6 or earlier, install the Solaris patches that allow you to run Java 1.3.

1. Log on to TeamSite through Netscape (see Chapter 3, "Using TeamSite Templating Java").
2. Navigate to your workarea.
3. Select **File > New Data Record**. A message displays telling you that TeamSite Templating is not installed on your computer.
4. Click **Install** to start the software installation.
5. One or more Java digital security screens display. These screens indicate that a Java application wants to download and execute the install program on your computer. Click **Grant** on each screen to continue.
6. The install program displays with a button labeled **Start Installer for Solaris Sparc**. Verify that the **Include VM in download** check box is checked.
7. Click the **Start Installer** button. Normally you should accept the defaults and click **Next** to continue through the installation program.
8. Click **Done** when installation finishes. Close the browser window containing the installation program.

Additional Java digital security screens may display. Again, click **Grant** to continue. You may see these screens whenever you restart TeamSite Templating. If desired, you may turn on the checkbox to remember these permissions.

When you complete the installation, the New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in Chapter 3, "Using TeamSite Templating Java."

To preview the data content record from a Solaris client, you should include the browser path in your client's PATH variable.

Note: If you are prompted to update your version of TeamSite Templating Java, proceed with the installation. When the installation completes, you will need to reselect the action (such as **File > New Data Record**) to continue.

Installing on Mac OS Platforms Using Internet Explorer

Internet Explorer allows a choice of two Java virtual machines. Check this setting prior to logging onto TeamSite and attempting to install the TeamSite Templating Client application by going to **Preferences > Web Browser > Java**. The **Java virtual machine** field will show either Apple MRJ or Microsoft Virtual Machine. If Apple MRJ is selected, the version must be MRJ 2.2 and above. No special setup is required; proceed with the install program.

If Microsoft Virtual Machine is selected, perform the following steps before installation:

1. In the Java panel of the Internet Explorer Preferences, add an entry to the Class Path field that points to the directory `<`*`TeamSite Templating install folder`*`>/For Microsoft VM`.
2. Select **Web Browser >Security Zones Preference**.
   a. Set **Zone** to **Trusted sites zone**.
   b. Click **Add Sites** and add `http://<`*`teamsite server address`*`>`; click **OK**.
   c. Select **Custom (for expert users)** and click **Settings**. Go to **Java > Java Permissions** and select **Unrestricted**. Click **OK** to close dialog boxes.

To install the TeamSite Templating client:

1. Log on to TeamSite through Internet Explorer (see Chapter 3, "Using TeamSite Templating Java").
2. Navigate to your workarea. Select **File > New Data Record**. A message displays telling you that TeamSite Templating is not installed on your computer.
3. Click **Install** to start the software installation.

4. The install program displays with a button labeled **Start Installer for Mac OS**. Verify that the **Include VM in download** check box is checked.
5. Click the **Start Installer** button. Normally you should accept the defaults and click **Next** to continue through the installation program.
6. Click **Done** when installation finishes. Close the browser window containing the installation program.

When you complete the installation, the New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in Chapter 3, "Using TeamSite Templating Java."

Note: If you are prompted to update your version of TeamSite Templating Java, proceed with the installation. When the installation completes, you will need to reselect the action (such as **File > New Data Record**) to continue.

Installing on Mac OS Platforms Using Netscape

1. Log on to TeamSite through Netscape (see Chapter 3, "Using TeamSite Templating Java").
2. Navigate to your workarea. Select **File > New Data Record**. A message displays telling you that TeamSite Templating is not installed on your computer.
3. Click **Install** to start the software installation.
4. One or more Java digital security screens display. These screens indicate that a Java application wants to download and execute the install program on your computer. Click **Grant** on each screen to continue.
5. The installation Web page displays with a button labeled **Download Installer for Mac OS**. Verify that the **Include VM in download** check box is checked.
6. Click the **Download Installer** button.
7. Save the `TSTP.bin` file.
8. Double-click on `TSTP.bin` to decode.

9. Click the **TSTP** button to install the file.

10. Close the browser window containing the installation program.

To actually start TeamSite Templating, click on the **TeamSite Templating Client** button on your desktop.

Select **File > New Data Record** from the TeamSite GUI to begin entering data. The New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in Chapter 3, "Using TeamSite Templating Java."

Additional Java digital security screens may display. Again, click **Grant** to continue. You may see these screens whenever you restart TeamSite Templating. If desired, you may turn on the check box to remember these permissions.

Note: If you are prompted to update your version of TeamSite Templating Java, proceed with the installation. When the installation completes, you will need to reselect the action (such as **File > New Data Record**) to continue.

Configuring Windows Platforms for Internationalization

If you are using Java Templating, the your client computer needs to run in a system locale that is the same language as the TeamSite server's locale. For example, the TeamSite server is running in Solaris Japanese EUC locale ('ja'), with file and directory names in Japanese. For the Java Templating user interface to display these Japanese file and directory names properly, the system locale on the client computer needs to be set to "Japanese". The system locale is in Japanese by default if the client operating system is a fully localized (Japanese) operating system on Windows NT or Windows 2000. On Windows 2000, even if the operating system is not fully localized, the system locale is switchable from the Control Panel; click **Regional Options**.

Setting Up Multiple Users on a Single Client

The TeamSite Templating Java client can support multiple users. To have multiple users on a single client computer, each client needs a TeamSite Templating Java client installation. When installing the TeamSite Templating Java client, change the location of the files during the second installation to avoid overwriting the first installation.

You also need to make the following changes for each client:

- In the `tst.lax` file, set:

  `iw.install.port=`*`unique_port_number`*
- In the `com_interwoven_templating100_dcredit.properties` file, change the value for `port` to the same port number that was set in the `tst.lax` file as follows:

  `port=`*`unique_port_number`*

Uninstalling TeamSite Templating Client

To remove the TeamSite Templating Client software from a computer running a Windows operating system, access the Control Panel. Select the **Add/Remove Program** button and remove the Interwoven TeamSite Templating Client software.

To remove the TeamSite Templating Client software from a computer running a UNIX or Macintosh operating system, run the `Uninstall Templating Client` file in the *`installation_path`*`/UninstallerData` directory.

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